HORIZON
Unlimited communications

Integrator Soft Client User Guide

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Introduction

Horizon Integrator has been designed to make your desk phone easier and more convenient to use. It can do this in a number of ways and this document will show you how.

Integrator is designed to be discrete - always running and providing useful information as you need it, yet at the same time not annoying and interfering when you're trying to work. So, for most of the time, Integrator sits silently in your tray menu, waiting for you to click on it.

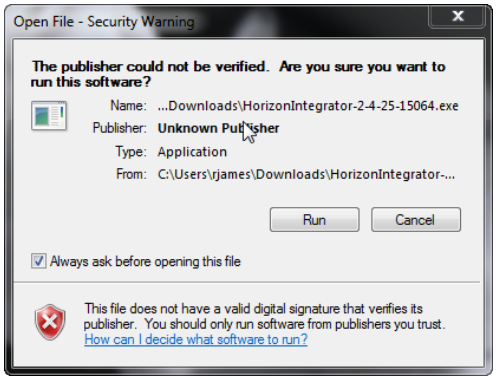
Note: In Windows 7, some tray icons become hidden and expressly have to be shown. These settings are stored in the 'Notification Area Icons' part of the Windows Control Panel and will need to be updated locally.

Installing the Integrator Soft Client

Once you have been allocated the feature by your Administrator, you will receive an email / emails from the Horizon system. The confirmation email will contain a link that you need to follow in order to download the client locally.

Please note: A local install will require admin rights on the relevant machine for the initial installation of an executable file (.exe). You must check with your network administrator before installing the software, to ensure you can run the .exe files.

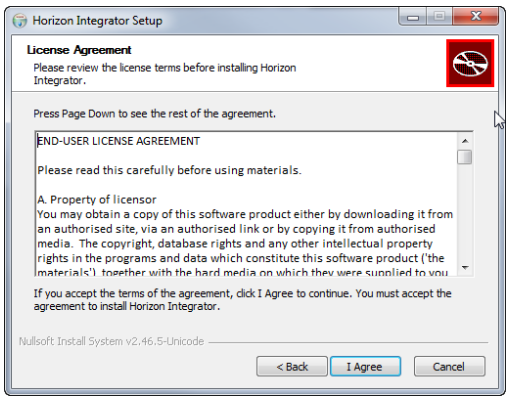
Download the file that is linked in the e-mail.


Open File - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: ...Downloads\HorizonIntegrator-2-4-25-15064.exe
Publisher: Unknown Publisher
Type: Application
From: C:\Users\rjames\Downloads\HorizonIntegrator-...
Run
Cancel
Always ask before opening this file
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust.
How can I decide what software to run?

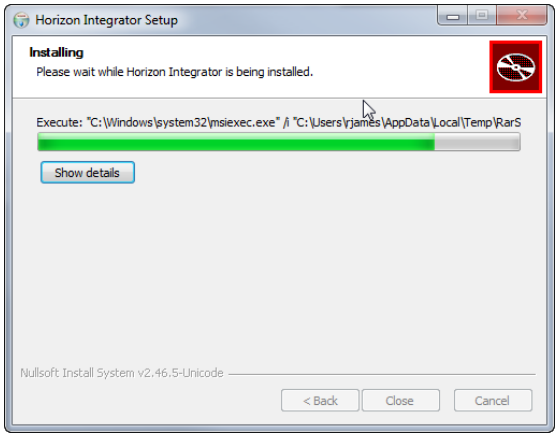
Before continuing you should close all your programs down. Click "Next>"

Horizon Integrator Setup
Welcome to the Horizon Integrator Setup
Setup will guide you through the installation of Horizon Integrator.
It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.
Click Next to continue.
Next >
Cancel

Read the end user license agreement and once you're happy, click "I Agree".


Horizon Integrator Setup
License Agreement
Please review the license terms before installing Horizon Integrator.
Press Page Down to see the rest of the agreement.
END-USER LICENSE AGREEMENT
Please read this carefully before using materials.
A. Property of licensor
You may obtain a copy of this software product either by downloading it from an authorised site, via an authorised link or by copying it from authorised media. The copyright, database rights and any other intellectual property rights in the programs and data which constitute this software product ('the
If you accept the terms of the agreement, click I Agree to continue. You must accept the agreement to install Horizon Integrator.
Nullsoft Install System v2.46.5-Unicode
< Back
I Agree
Cancel

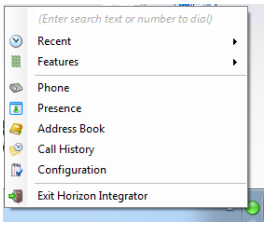
Integrator Setup will now run through the setup. Once it has completed you can click "Done".



Signing in

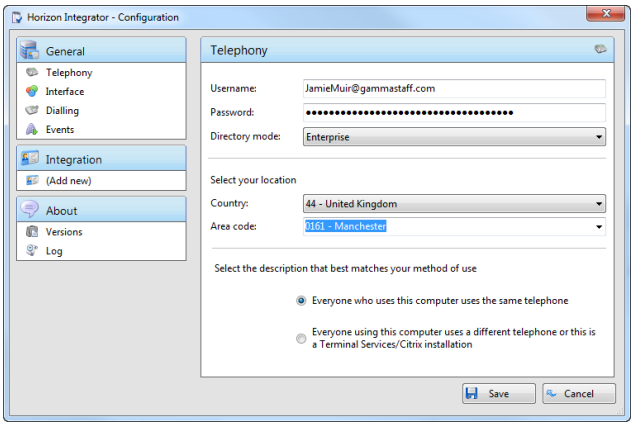
To get up and running with Integrator, you'll need to enter your username and password - please note these are different than the Portal login details. Please speak to your Administrator if you don't have your log in details.

The details can be entered by right clicking the Integrator icon in your taskbar and selecting 'Configuration'.



From there, select 'Telephony' and enter your username and password. The directory mode will default to group; we'll touch on this later in the 'Presence' section.

You'll also need to specify your location, select your country and area code from the drop down list and click 'Save' - you should now be ready to go.

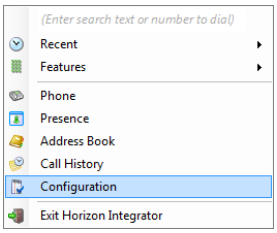


Passwords

A single password (**that is separate to a user's Horizon portal password**) is generated per user by the system for use with ALL software clients (Integrator, Integrator CRM, desktop soft client and the mobile soft client). If a user is using more than one client (Integrator and the mobile soft client, for example) then only the assignment of the first client will result in a password being generated; this will be received before a confirmation email with download instructions. For all subsequent clients, only the confirmation email will be sent.

Settings and Configuration

The Configuration section contains many options that allow you to customise your installation of Integrator. The following will cover the most common settings. If you select the Configuration menu item from the tray menu then you are given a page with options on the left hand side.

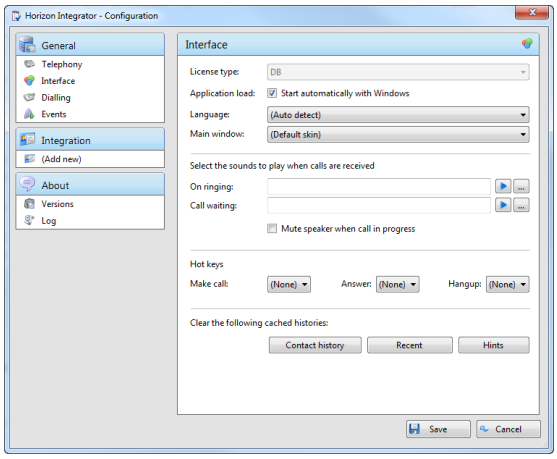


Telephony settings

These settings are covered in the ‘Signing in’ section.

Interface settings

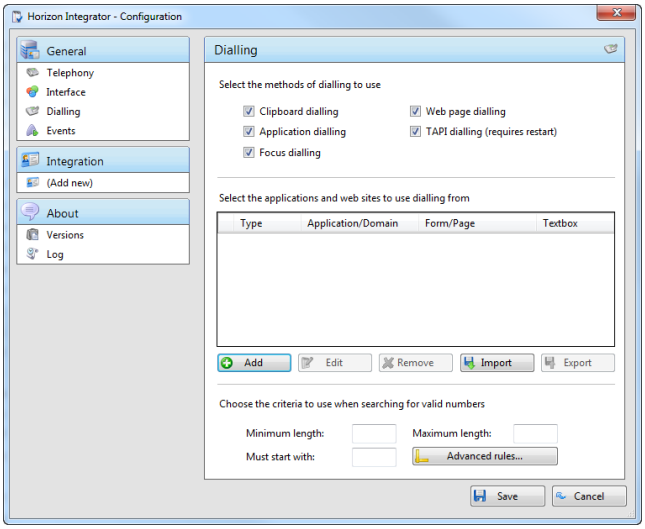
Interface settings let you define some personal preferences and hotkey settings. Within the page you can;



- Set if you'd like Integrator to start with Windows
- Play sounds though your PC when calls are ringing or waiting
- Set hot keys for making a call, answering a call or hanging up
- Clear locally cached histories

Dialling settings

This page allows you to turn on and off dialling from all the different types of application that Integrator supports.



As a review, the different methods of clipboard dialling are;

- Clipboard dialling - where you copy a telephone number to the clipboard and the software detects it
- Web page dialling - where the software automatically scans web pages in Internet Explorer or other supported web browsers and converts anything that looks like a telephone number into a clickable hyperlink and adds new buttons next to telephone number fields that you have told it about
- Application dialling - where the software adds new Dial buttons to applications that you have told it about
- TAPI dialling - where any application that supports Microsoft TAPI (Telephone Application Programming Interface) can dial through Integrator
- Focus dialling - dynamically recognise any numbers in textboxes that looks like the phone numbers and allows to dial that number out

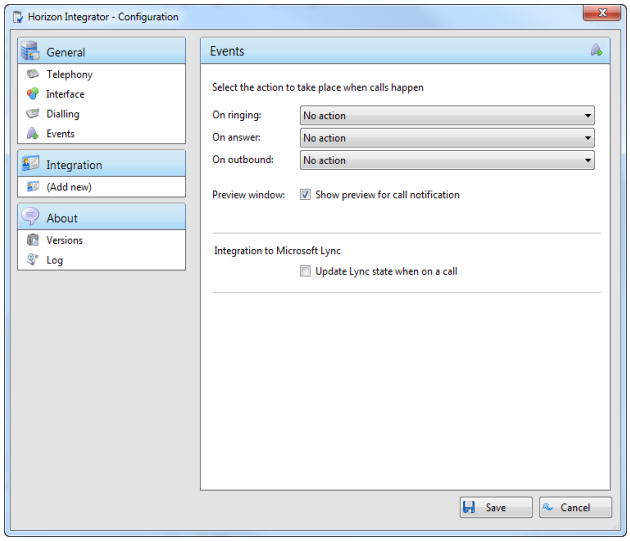
Events settings

You can force Integrator to either show the Phone window or pop the contact when certain events happen. Just select the relevant action from the relevant dropdown list:

- On ringing
- On answer
- On outbound.

You can also turn on or off the unobtrusive Preview window for all calls by ticking or clearing the box.

Integration to Microsoft Lync allows you to update your Microsoft Lync state when you are on a call. By ticking the box, your Microsoft Lync status will change to “In a Call” when your extension is on a call.

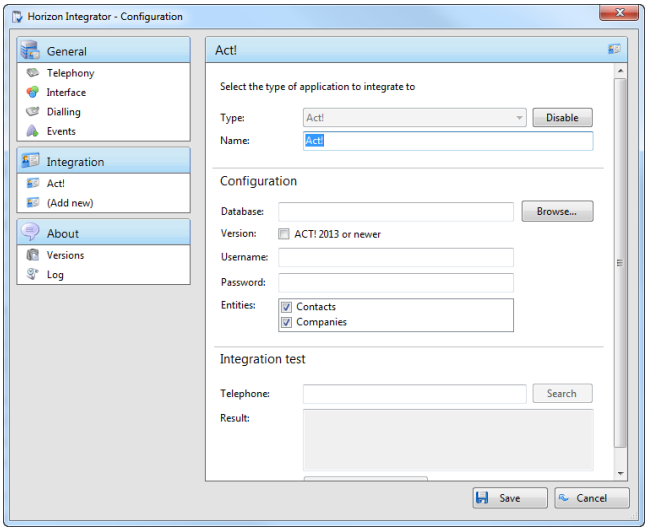


Note: Your Microsoft Lync status will only change when your PC is powered on and Integrator is running.

Integration settings

The Integration pages allow you to see and modify the databases that you have set up integration with. Integration means the database will be searched when calls happen to convert telephone numbers into names; and the database will be searchable manually from the Address Book window; and contacts that are found in the database can be “popped”.

Please refer to the individual ‘addin guide’ if you wish to add a database.

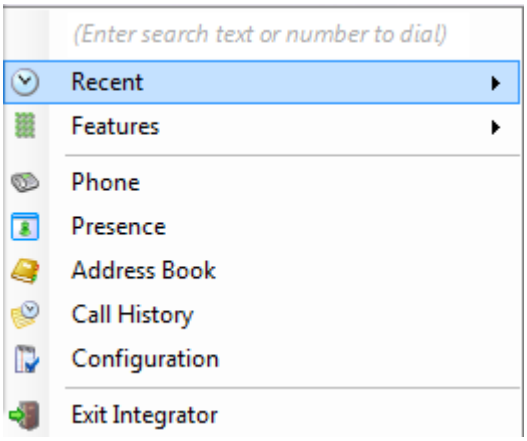


The Basics

Tray menu

Right click on the Integrator icon in your notification area. If you're sitting 'in available' it'll be a green circle, if you're on a call it will be red.

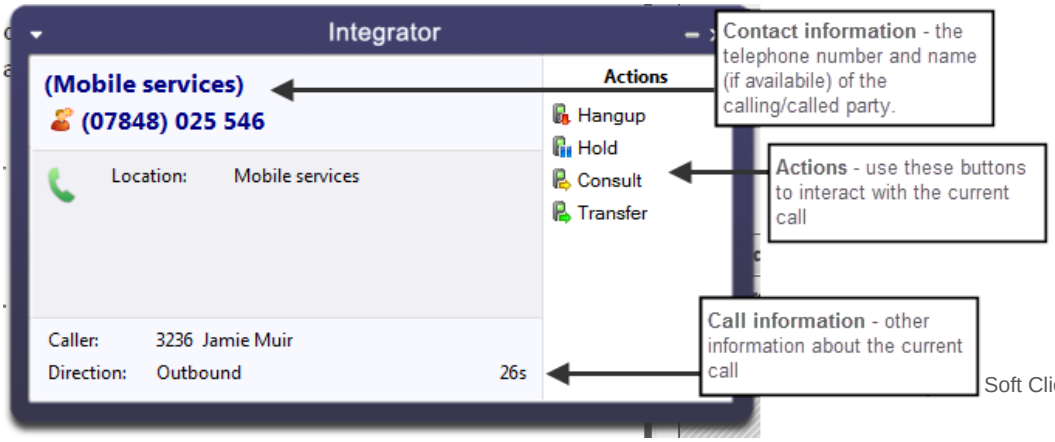
This will open the tray menu, which should look like this. From the top down we have;



- Quick dial box - you can type a number to dial or enter a name to find a contact
- Recent menu - quickly see recently dialled numbers and click to redial them
- Features menu - amend call settings such as do not disturb and call forwarding
- Phone - opens up the phone window, covered in more detail below
- Presence - opens up the presence window, covered in more detail below
- Address book – you can search for a user in your company directory or one that's in a connected CRM
- Call history - opens the call history window that details your recent incoming, outgoing and missed calls
- Configuration - used to configure which CRM packages you integrate with
- Exit - use this to exit the software

Phone window

The phone window can be accessed by either selecting it from the tray menu (as shown above) or by double clicking the Integrator icon in the bottom right of the screen. The screenshot below shows the window during an active call.

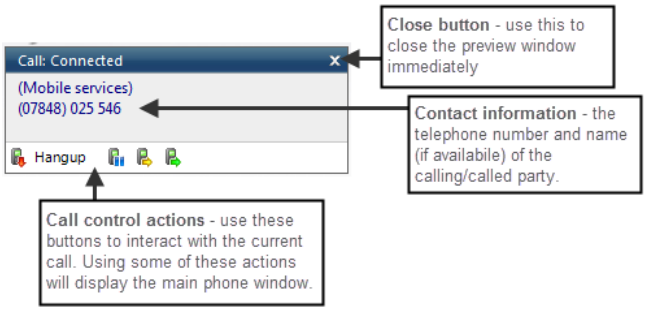


You can use the Phone window if you want to control calls or show contacts. After you've used the software for a while, though, you'll probably prefer to use the Preview window as it can be more convenient and less intrusive.

Preview window

The preview window will appear when a call is ringing or answered, and will look similar to the below.

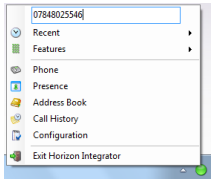
Like the Phone window, the actions at the bottom of the preview window adapt to the state of the call. The example picture shows the actions that are available when a connected call is in progress.


Call: Connected
(Mobile services)
(07848) 025 546
Hangup
Close button - use this to close the preview window immediately
Contact information - the telephone number and name (if available) of the calling/called party.
Call control actions - use these buttons to interact with the current call. Using some of these actions will display the main phone window.

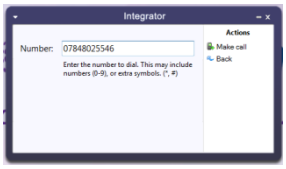
Making calls

Integrator offers several ways of making calls using your PC without the need to pick up your handset and dial. Below are a few real life scenarios of where you may have a number stored that you'd like to dial and how Integrator can help make that simpler.

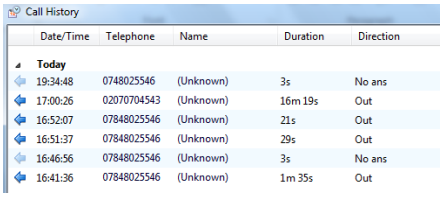
- A piece of paper
  - From the Integrator tray menu, you can type the number into the text box at the top and then hit enter. This will initiate a call to that number.



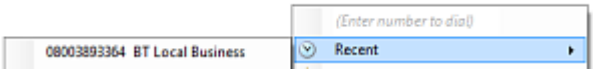
  - If you happen to have the phone window open, you can start to type the number using your keyboard. Integrator will know that you're trying to make a call and will switch to the 'Make call' screen. Press enter or click 'Make call' to initiate a call to that number.



- Someone you spoke to on the phone recently
  - As long as you spoke to them on your Horizon phone then the call will be in your call history. From the tray menu, select 'call history' and you'll see a list of your calls in reverse date order. Locate the caller from the list and click on their number to initiate a call to them.


Call History
Date/Time Telephone Name Duration Direction
Today
19:34:48 0748025546 (Unknown) 3s No ans
17:00:26 02070704543 (Unknown) 16m 19s Out
16:52:07 07848025546 (Unknown) 21s Out
16:51:37 07848025546 (Unknown) 29s Out
16:46:56 07848025546 (Unknown) 3s No ans
16:41:36 07848025546 (Unknown) 1m 35s Out

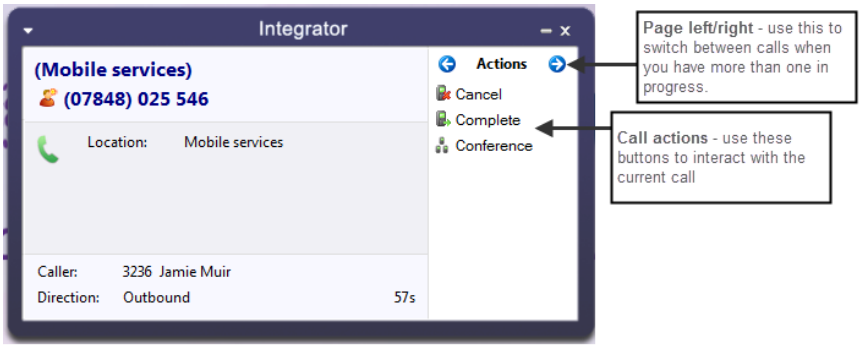
  - Alternatively, if they were one of the last 10 people you spoke to then they will show in your 'Recent' list. From the tray menu (or phone window) select recent and select their number to initiate a call.



Call control

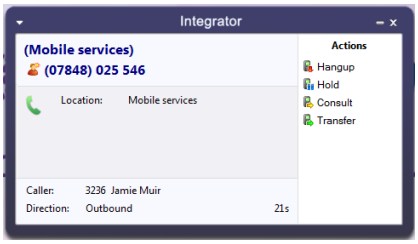
Active call

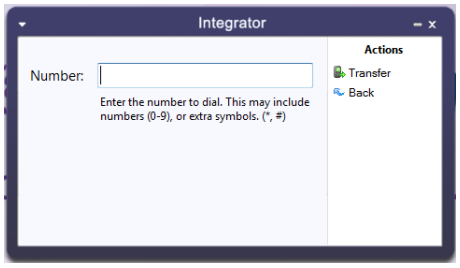
The call control screen appears when you make or receive a call, with the same 'Call actions' appearing next to the Integrator icon in your notifications panel.


Integrator
(Mobile services)
(07848) 025 546
Location: Mobile services
Caller: 3236 Jamie Muir
Direction: Outbound 57s
Actions
Cancel
Complete
Conference
Page left/right - use this to switch between calls when you have more than one in progress.
Call actions - use these buttons to interact with the current call

The phone window allows you to interact with the current call in a number of ways, including the transfer of calls. To do this you must be connected to the call you would like to transfer, i.e. it cannot be on hold or ringing.

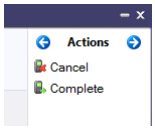
When you are connected, the actions list looks like it does to the right. To transfer a call you do not need to place it on hold, instead press either the consult (if you'd like to speak to the other person first) button or transfer (if you do not want to speak to the other person first).

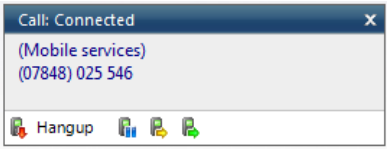




You are then presented with a screen similar to the 'Make a call' screen, but with the word Consult or Transfer to the right of the Number field. Your call is not on hold at this stage, but when you are ready, enter the number to transfer to, then click;

- 'Consult' to place the current call on hold, while you speak to the other party. You can then press complete or cancel.
- 'Transfer' to put the call straight through to the other party



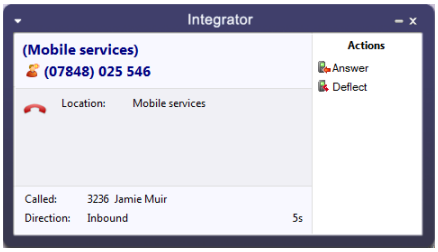


Note: all the call actions on the main phone window can also be accessed via the preview window that appears next to the Integrator icon.

Ringing call

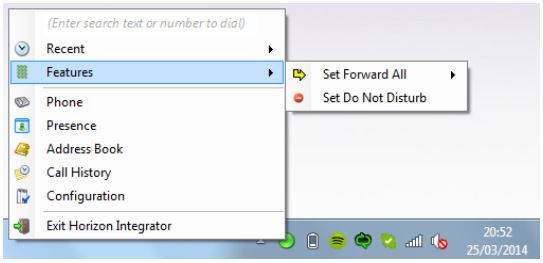
A ringing call can be either;

- Answered - which will answer the call on your Horizon phone
- Deflected - which will give you the ability to direct the call to an alternate number



Features

The Features menu provides you with options to control the behaviour of your phone. There are three options available from this menu; “Call settings”, “Set Forward All” and “Set Do Not Disturb”.



Set forward all

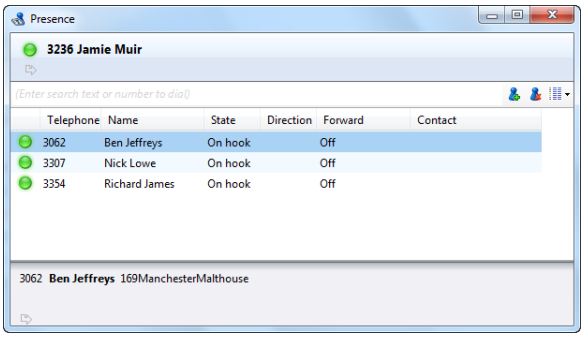
“Set Forward All” allows you to enter a number that will be called when someone calls your extension. Please remember that that your phone will not ring when this is set.

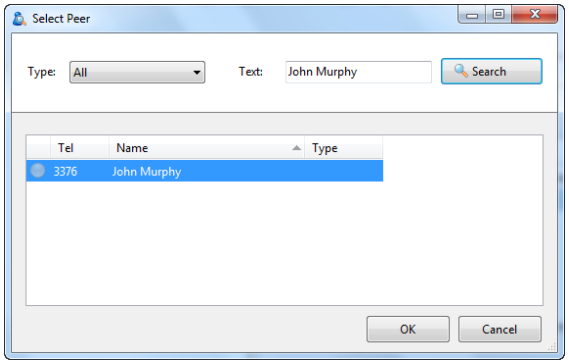
Set Do Not Disturb

“Set Do Not Disturb” allows you to set your phone so that a caller will hear the busy tone when they call your extension.

Presence

Presence provides a simple and quick way for you to check the status of your colleagues' extension. The window can be accessed from the tray menu by selecting 'Presence'.





You can customise your list from this window by clicking the green plus icon, searching for the person you'd like to add and clicking 'OK'. Under 'Type' you can select either extension, to search by extension only, or all, to carry out a free text search.

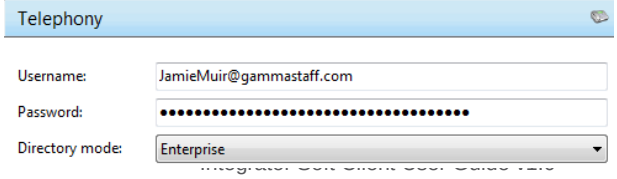
Note: the list is limited to 20 extensions or users

The circle next to each of your monitored contacts will indicate the state of their extension. This key shows each of the possible states.

Colour	Status
Solid green	On-hook
Flashing red	Ringing
Solid red	Call connected
Flashing yellow	On hold
Solid grey	Off-line

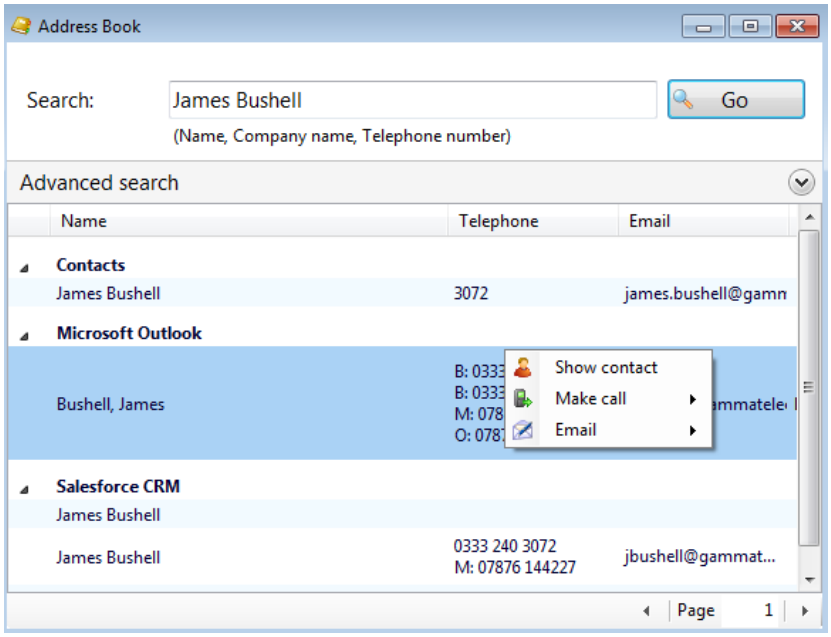
You can right click any of your monitored contacts and will be presented with appropriate option(s). If you are not on a call, you'll have an option to initiate a call to that user. If you are currently on an active call, you'll have the option to consult or transfer to that user - as described in the Call Control section.

Note: by default the search will only look for users in the same group as you. If you want to search companywide, you'll need to go to Integrator > tray menu > configuration > telephony > and update the Directory Mode to 'Enterprise'.



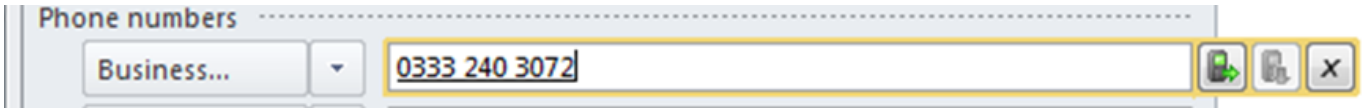
Desktop Address Book (Contacts Search) with Click-to-Dial

The address book will interrogate any integrated applications database for contacts and allow you to click-to-dial, email and contact pop where possible.



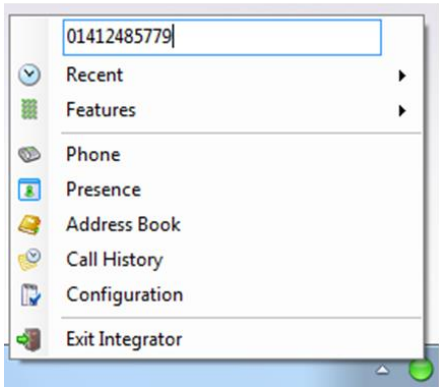
Click-to-Dial – Outlook

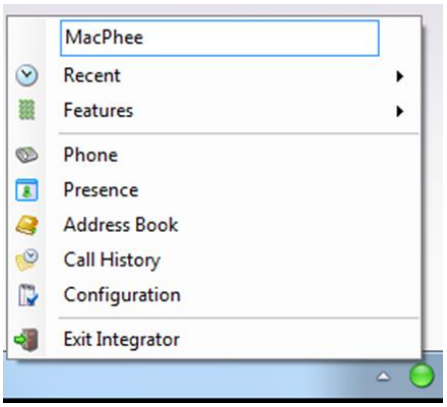
You can find a contact and dial from the Outlook program directly.



Click-to-Dial – Quick Dial / Search

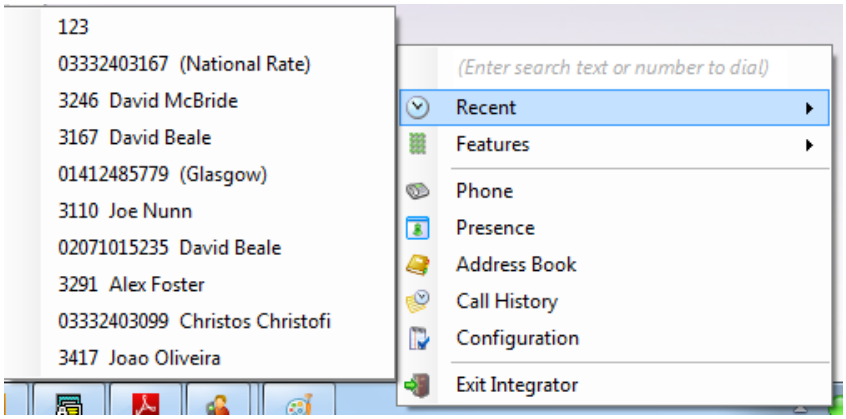
In the desktop tray, you can type the number to dial, or a name of your contact. If you type a name, it will launch the address book search function and perform the search immediately





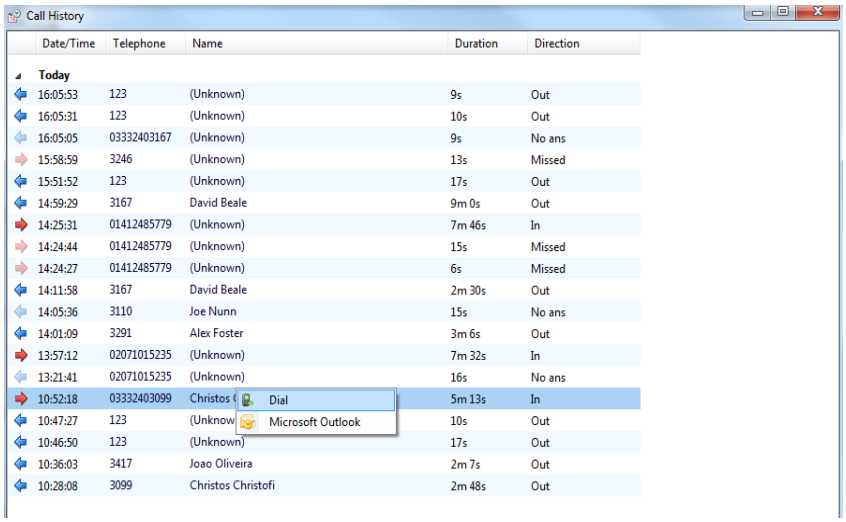
Click-to-Dial – Recent Calls

You can click to dial instantly from a list of recently made/received calls



Click-to-Dial – Call History

This is an extensive list of previously made/received calls. You can click to dial or pop the contact if they are recognised by the application.

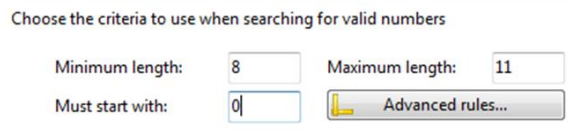

Call History
Date/Time Telephone Name Duration Direction
Today
16:05:53 123 (Unknown) 9s Out
16:05:31 123 (Unknown) 10s Out
16:05:05 03332403167 (Unknown) 9s No ans
15:58:59 3246 (Unknown) 13s Missed
15:51:52 123 (Unknown) 17s Out
14:59:29 3167 David Beale 9m 0s Out
14:25:31 01412485779 (Unknown) 7m 46s In
14:24:44 01412485779 (Unknown) 15s Missed
14:24:27 01412485779 (Unknown) 6s Missed
14:11:58 3167 David Beale 2m 30s Out
14:05:36 3110 Joe Nunn 15s No ans
14:01:09 3291 Alex Foster 3m 6s Out
13:57:12 02071015235 (Unknown) 7m 32s In
13:21:41 02071015235 (Unknown) 16s No ans
10:52:18 03332403099 Christos 5m 13s In
Dial
Microsoft Outlook
10:47:27 123 (Unknow 10s Out
10:46:50 123 (Unknown) 17s Out
10:36:03 3417 Joao Oliveira 2m 7s Out
10:28:08 3099 Christos Christofi 2m 48s Out

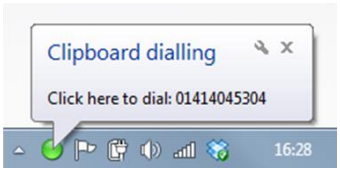
Click-to-Dial – Clipboard Dialling

You can copy a number to your clipboard to make a call.

As soon as the number is copied to the clipboard, a bubble is popped in the tray icon, simply click the bubble to make the call.

It is best to define the minimum and maximum digits to ensure the soft client matches on probable numbers. The detail below is suggested for this.


Choose the criteria to use when searching for valid numbers
Minimum length: 8
Maximum length: 11
Must start with: 0
Advanced rules...



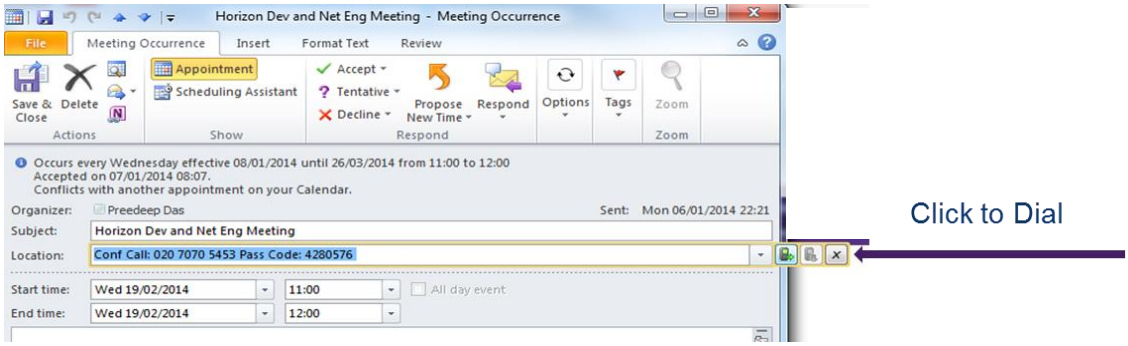
Click to Dial - Web Page Dialling

This function can work in various browsers including i.e. Google Chrome, Mozilla and Safari and when enabled, numbers are displayed as hyperlinks which can then be clicked to dial.

Customer services for existing customers	0844 811 9111	Lines open 24 hours, seven days a week
For information and to apply	0845 766 0758	Lines open Monday to Friday 8am-8pm and Saturday 8am-2pm
Deaf helpline (Minicom)	0844 811 9191	Lines open 24 hours, seven days a week

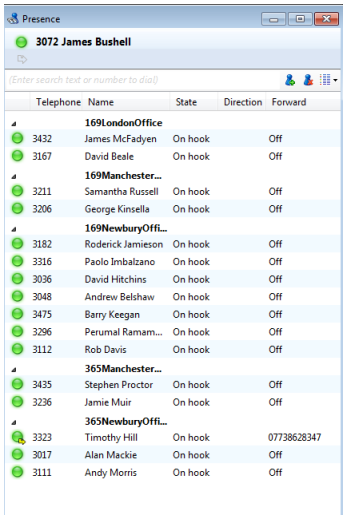
Click to Dial – Focus Dialling

This function will detect fields which contain dial-able numbers and will then present a dial button. This is very useful within meeting requests as an example.



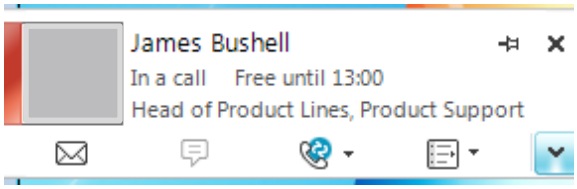
Presence with Click to Dial

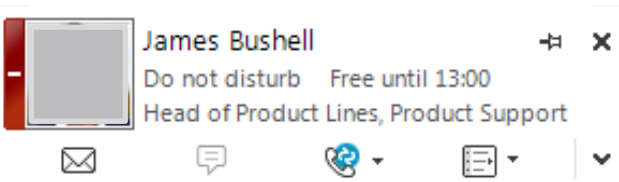
You can monitor up to 20 extensions defined by user as well as make calls and transfer calls to colleagues. This is very similar to Busy Lamp Field functionality.


Presence
3072 James Bushell
(Enter search text or number to dial)
Telephone Name State Direction Forward
169LondonOffice
3432 James McFadyen On hook Off
3167 David Beale On hook Off
169Manchester...
3211 Samantha Russell On hook Off
3206 George Kinsella On hook Off
169NewburyOffi...
3182 Roderick Jamieson On hook Off
3316 Paolo Imbalzano On hook Off
3036 David Hitchins On hook Off
3048 Andrew Belshaw On hook Off
3475 Barry Keegan On hook Off
3296 Perumal Ramam... On hook Off
3112 Rob Davis On hook Off
365Manchester...
3435 Stephen Proctor On hook Off
3236 Jamie Muir On hook Off
365NewburyOffi...
3323 Timothy Hill On hook 07738628347
3017 Alan Mackie On hook Off
3111 Andy Morris On hook Off

Microsoft Lync Integration

You can see updates on Lync when you're on a call or when Do Not Disturb (DND) is set.

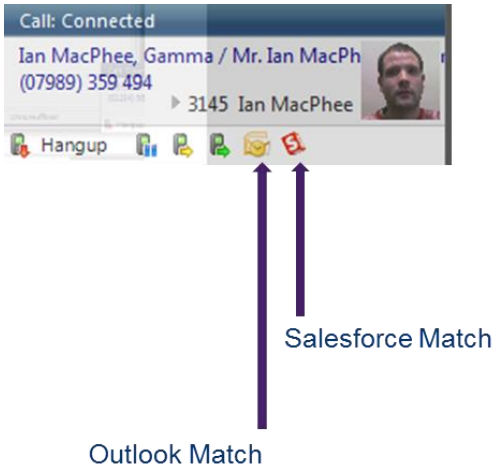




Please note that updates are unidirectional from Integrator to Lync.

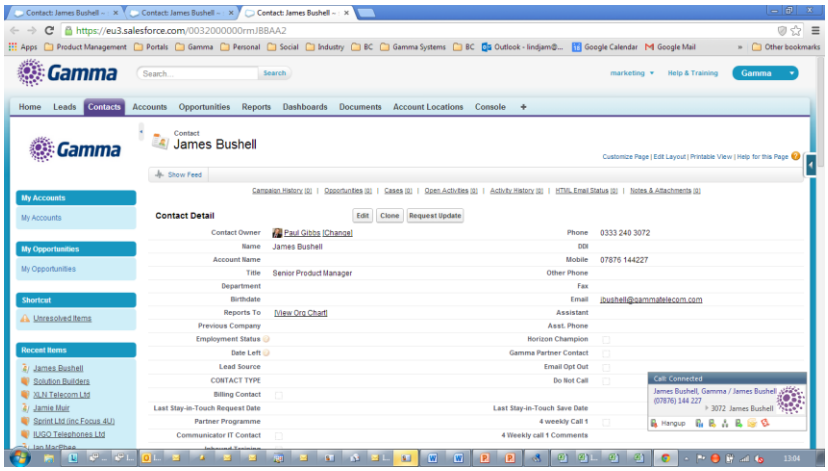
Call Preview

This will display the caller (or called party) name in the Preview or Phone window when a match is found in the shared address book or integrated application(s). The icon for specific application(s) is displayed and in this example, it is Outlook and Salesforce. You can then click on the icon to pop the Contact.



Contact Popping

When you receive a call, you will see the calling party contact popping on screen (if saved in the relevant application – Outlook or chosen CRM).



Service limitations

The following service limitations should be carefully considered when using the Horizon soft clients.

3G and 4G networks

We cannot guarantee any aspect of setting up and conducting a Horizon call over any mobile network, whether using a Horizon mobile client or a desktop client on a tethered laptop. Mobile networks provide no prioritisation of signalling and voice payload packets and some networks will either block or slow down VoIP packets.

Before you report a call quality or availability issue on a desktop or mobile client, please ensure you have checked that a mobile network is not being used to connect to the platform, as we are unable to provide support for such incidents.

Using the clients over 3/4G will consume data that may either result in charges being raised by your mobile operator or be counted against your monthly data allowance. The amount of data transferred during a call will be dependent on codec used.

Wi-Fi Networks

We cannot guarantee the call quality when Horizon calls are made over Wi-Fi, owing to limitations of Wi-Fi as a transport mechanism for VoIP packets. We also expect the quality of Wi-Fi connections to vary (office Wi-Fi, home Wi-Fi and public Wi-Fi hotspots) and consequently you need to consider how Horizon is used over Wi-Fi and your expectations must be set accordingly.